



Advocates & Guardians for the Elderly & Disabled

Post Office Box 520878

Longwood, Florida 32752-0877

Phone: (407) 682-4111

Fax: (407) 682-5511

Email: nick@aged501.org

Website: www.aged501.org

Welcome and thank you for using the AGED Pooled Special Needs Trust.

Advocates & Guardians for the Elderly & Disabled (AGED) Inc. is the Trust Administrator for the Special Needs Trust. We are here to answer all of the questions and concerns you may have regarding your trust account. Our primary goal is to continue to protect your government benefit eligibility, while providing excellent trust administration and support. To better serve you, we have included documents for your immediate use along with Valuable contact information.

Notification, with documentation should be provided to your local Social Security Administration office or Medicaid Administration Office advising them that your money has been placed in a Pooled Trust. Remember to ask for a **disability determination** at the first meeting when applying for benefits at Social Security and/or Medicaid.

A Disbursement Request Form is enclosed. Please begin using this form immediately. Make copies to keep on hand for future use. Complete the form (and ensure the beneficiary advocate signs it) and fax/mail it to our office with a copy of the invoice(s) and/or receipt(s) you are requesting to have paid. It is imperative that the print be legible and complete all required information on the disbursement request form to prevent a potential delay in payment. If we have any questions about the disbursement(s) submitted we will call to determine if the problem can be corrected.

Please remember that complex State and Federal rules govern your trust. We recommend that you call us in advance if there are any questions about whether a disbursement can or cannot be paid, or if you foresee any circumstances that may arise in the administration of your trust that may require special attention. We must pay the vendor, creditor, or third party that is providing you with a service or product directly. **In order to prevent a potential reduction or loss of government benefit eligibility** we can not make any cash disbursements to you as the trust beneficiary.

We hope that you find the information enclosed helpful and we look forward to serving you.

Thank you.

Nick Barton
Executive Director